

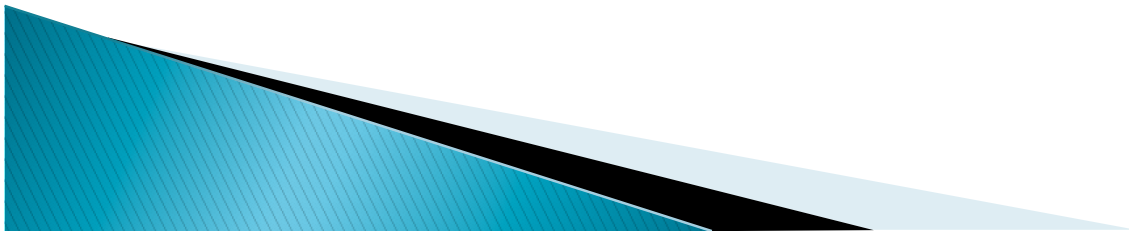


Round 2 Housing Setups and Change Orders

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Activity Level Setups

- * Submit under Subrecipient Grant in HCS
 - * Submit under appropriate Housing Program
 - * Use consolidated 11.17 Budget Details
- **NOTE:** Only consolidated 11.17 Budget Details will be available for Setup/Change Order processing after 1/1/13.

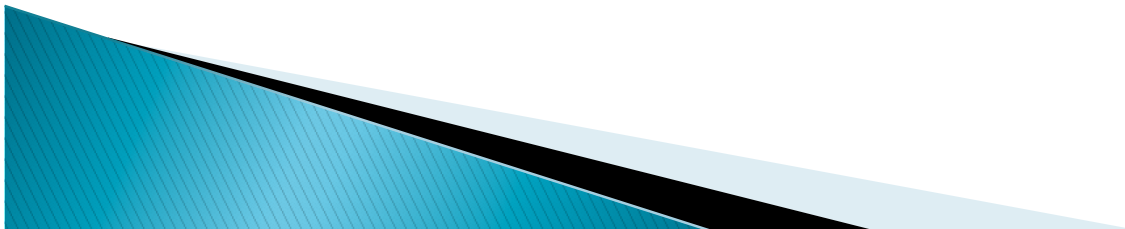


Setup Documentation:

- Form 16.20 (Setup Checklist)*
- Income Documentation*
 - Household Income Worksheet
 - HIC
- Initial Inspection*
- Form 11.17 (Work Write-up)**
- Construction Contracting Documentation
 - Local Construction/Tri-Party Agreement (Locally Procured Builders)
 - State Builder Construction Contract (State Procured Builders)
- DOB (Duplication of Benefits)**
- ADA Certification** (Optional)

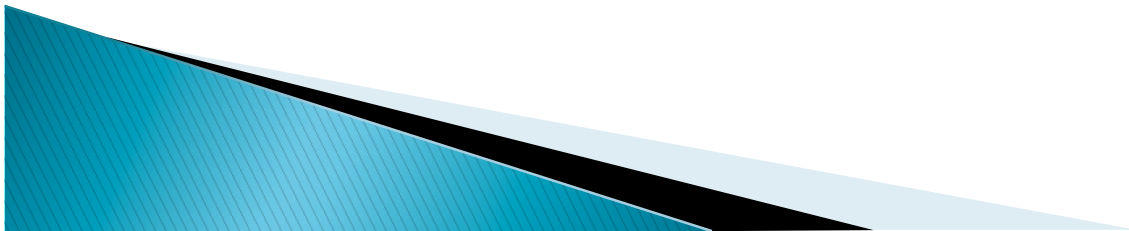
* Under Revision

** Document/process Revised



Change Orders

- ▶ When is a Change Order needed?
 - When there is an increase to any Budget Detail Item (based on 11.17 details).
 - When GAP funding increases.
- ▶ When is a Change Order NOT needed?
 - If costs are reduced for any Budget Detail Item.



Change Orders:


How do I submit my Completed Change Order?

- Email: dr.housing.change.orders@glo.texas.gov

Where can I locate the needed forms?

- [Texas General Land Office Website](#)

What documentation is needed?

- Set Up and Revision Checklist (Form 16.20)
 - Consolidated Change Order Request (Form 11.09)
 - Amended Promissory Note (Form 13.09e)
 - Supporting Documentation
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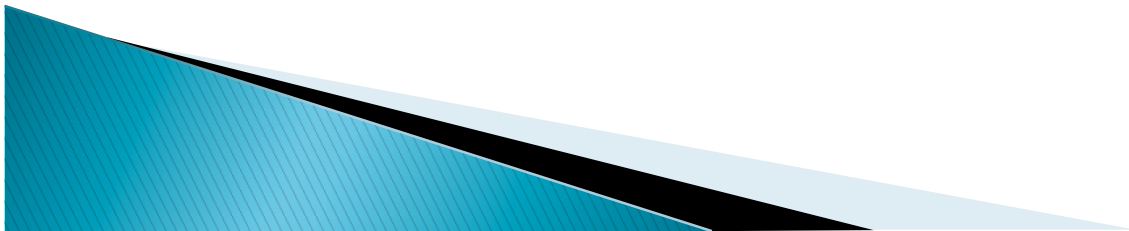
Documentation for Change Orders:

Amended Promissory Note (Form 13.09e)

- Only needed if CDBG Funded Amount increases.
- Should be a complete and accurate reflection of the revised CDBG set up amount as per the submitted change request.

Supporting Documentation

- Should support both the eligibility and costs associated with the changes requested on the Consolidated Change Order Request Form.



Documentation for Change Orders:

Consolidated Change Order Request (Form 11.09)

The following must be complete and accurate on every Change Order Request:

Sub-recipient	<input type="text"/>	Contract #	<input type="text"/>	Activity #	<input type="text"/>
Change Order #	<input type="text"/>				
Homeowner Name	<input type="text"/>	Homeowner Address	<input type="text"/>		
Building Contractor Name, Addr	<input type="text"/>				

and

NOTE: ALL Change Orders must be signed and authorized by the Homeowner and Subrecipient below:

Homeowner Signature	<input type="text"/>	Date/Time Field	<input type="text"/>
Sub-recipient Authorized Representative Signature:	<input type="text"/>	Date/Time Field	<input type="text"/>

The interactive form displays additional instructions. When using a cursor, hover over the fillable form data fields.

Consolidated Change Order Request (Form 11.09) – Construction Contract Changes

I. CONSTRUCTION COST CHANGE ORDER AUTHORIZATION

The following changes in cost are related to the Construction Contract only. Not valid unless signed and dated by Building Contractor identified above. Signature indicates agreement herewith, including any adjustments in the Contract Cost and/or the Contract Time.

Building Contractor Signature: Date:

The Contract Time will be changed by (# of days):

The Date of Construction Completion as of the date of this Change Order is:

Construction Items to be changed in this Change Order:

Construction Item	Original Cost per Item	Current Cost per Item	Description of Change	Change in Cost (+ or -)	Reason for Change
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

A. Total Construction Costs (From original Form 11.17):

B. Amount of Previously Approved Construction Change Orders:

C. Current Construction Change Order Amount:

D. Total Construction Costs for Activity (A+B+C) :

% of Change to Construction Costs (B+C)/A:

\$0.00

0.00%

This section should be complete and accurate for all change orders specifically requesting to add scope of work to the construction contract.

Consolidated Change Order Request (Form 11.09) – Soft Cost Changes

II. SOFT COST CHANGE ORDER AUTHORIZATION

The following changes in cost are related to Soft Costs only and are not included in the construction contract.

Soft Cost Changes do not require the Building Contractor's signature.

Soft Cost Items to be changed in this Change Order:

Soft Cost Item	Original Cost per Item	Current Cost per Item	Description of Change	Change in Cost (+ or -)	Reason for Change
1					
Total					

E. Original Soft Costs for Activity:

F. Amount of Previously Approved Soft Cost Change Orders:

G. Current Soft Cost Change Order Amount:

H. Total Soft Costs for Activity (E+F+G):

Total New Set Up Cost for this Activity (D+H):

This section should be complete and accurate for all change orders specifically requesting to increase the scope of work for any soft, non-construction costs.

Final Change Order to Sweep Balance – NO LONGER NEEDED

Forgivable Balance Letter

- * Issued by Subrecipient to Homeowner
 - * Submit copy of letter to GLO as a Change Order
 - * GLO sweeps balance of Activity budget back into specific Housing Program.
- ▶ Sample Forgivable Balance Letter will be on website



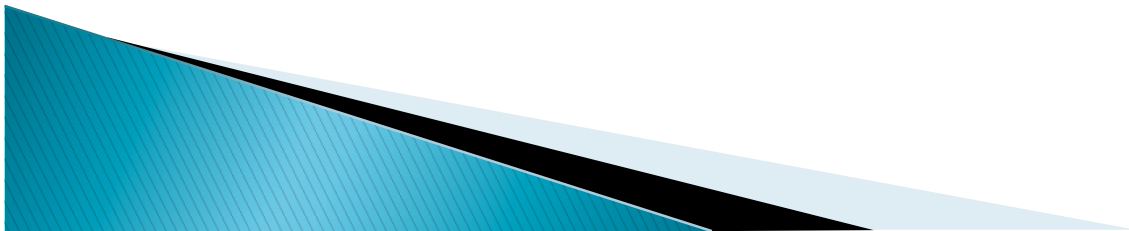
IN CONCLUSION – New for Round 2 Setups/C.O.

SETUPS –

- * Site specific Environmental documentation no longer needs to be submitted with Setup
- * New DOB (Duplication of Benefits) form
- * New Budget Details (consolidated 11.17)
- * ADA Certification – no longer requires a Doctor signature

CHANGE ORDERS –

- * New Combined Change Order Form (Hard Cost & Soft Costs)
- * Change Orders/Revised Promissory for increases only
- * New “Forgivable Balance” process for completed Activities





Thank You Q & A

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